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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Group Art Unit: 3624  
Examiner: Daniel S. Felten

In Re PATENT APPLICATION OF

Applicants : Joseph P. HEALY et al.  
(formerly Suzanne S. Allison et al.)

Appln. No. : 09/393,024

Conf. No. : 2147

Filed : September 9, 1999

For : SYSTEM FOR FINANCIAL PLANNING

Atty. Dkt. : 2543-128329

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U.S. PATENT AND  
TRADEMARK OFFICE

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Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-1450

**Applicants' Statement of the Substance of the Interview**

Sir:

In response to the Interview Summary dated September 13, 2005 for the interview conducted August 31, 2005, Applicants submit the following Applicants' Statement of the Substance of the Interview.

**Participants:** (1) Examiner Daniel S. Felten, (2) Supervisory Patent Examiner (SPE) Vincent Millin, and (3) Applicants' Representative Michael A. Sartori, Ph.D.

**Date of Interview:** August 31, 2005.

**Type:** Telephonic.

1) Brief Description of the Nature of any Exhibit Shown or any Demonstration Conducted:

None.

2) Claims Discussed: None.

3) Specific References Discussed: None.

4) Identification of Specific Proposed Amendments: None.

5) Substance of Interview: The parties discussed the Amendment filed June 8, 2004.

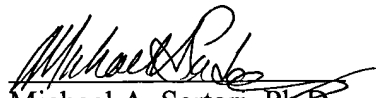
6) Other Pertinent Matters: None.

7) Results: Agreement was reached to withdraw the finality of the last Office Action. The Interview Summary indicates the Final Office Action was mailed January 13, 2004; however, Applicants note that the Final Office Action was mailed on January 20, 2004. The Examiners stated that a new action will be forthcoming in consideration of the Applicants' Amendment filed June 8, 2004 and that no response is due from the Applicants at this time.

Respectfully submitted,

Date:

September 29, 2005



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DC2-DOCS1-684318